



**ANALYTIC  
VIZION**

# Transforming Analytic Teams Through Strategic Intake Processes

Analytic Vizion partnered with a client to bring clarity and focus to their analytics work by designing a people-first intake process that prioritized high-impact projects, reduced chaos, and enabled continuous improvement.

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*The intake process gave our clients the clarity to focus on what matters most. Instead of juggling 25 competing priorities, they could finally say: ‘Here’s what we’re doing, here’s why, and here’s when.’ That shift created real momentum.*

**MATT BIGGER**  
Analytic Vizion

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## THE CHALLENGE

A senior data leader at an enterprise organization was facing a familiar pain: dozens of competing priorities, limited visibility into in-flight work, and stakeholders with growing demands. The data team wanted to help—but without a clear intake process, the result was fractured focus, missed deadlines, and lost trust.

## WHEN TO CONSIDER AN INTAKE PROCESS

You might need a system if:

- You're juggling too many requests and delivering too little value
- Stakeholders are frustrated by lack of communication or progress
- Projects are selected based on volume or urgency, not impact
- Your team is growing, but coordination is breaking down
- You're often saying yes before knowing what the ask really requires

## OUR APPROACH

Analytic Vizion partnered with the client to bring order and clarity to a chaotic environment by building a people-first intake process for analytics projects. Together, we focused on three key areas:

### Listening First

- Engaged stakeholders to understand priorities, pain points, and decision-making needs
- Uncovered misaligned expectations around effort vs. impact
- Revealed the cost of context switching across 25+ initiatives

### Building the Right Process

- Prioritized based on effort and impact—not politics
- Used project templates for faster onboarding and consistency
- Made room for both strategic projects and quick wins

### Improving Over Time

- Launched a “version 1” and refined it with feedback
- Removed unused fields, improved questions, and added feedback loops
- Shifted the culture from reactive to strategic

## OUTCOMES & RETURN ON IMPACT

- Clarity: From 25 competing initiatives to a prioritized roadmap
- Focus: Empowered the team to say “yes” with confidence—and “no” with clarity
- Productivity: Reduced required input fields from 172 to 12 in one case, saving hundreds of hours annually
- Engagement: Transformed project updates from drudgery to alignment
- Scalability: Enabled better planning as the team grew headcount

